

THE EXECUTIVE INVENTORY

### **THE EXECUTIVE INVENTORY**

1. The purpose of a Career Service Program is to develop people to the fullest extent to meet present and anticipated job needs of the Agency. An "executive inventory" is merely a means of matching present and potential executive-type assets against present and anticipated needs for executive ability in order to plan intelligently to meet these needs.

2. As an aid to personnel planning for the development and use of executive skills throughout the Agency, the CIA Career Service Board will maintain an inventory of all personnel who evidence executive ability or potential according to criteria which the Board shall determine from time to time in relation to Agency needs. The Board will review Personnel Evaluation Reports on all personnel included in the inventory and will recommend inter-Office rotation assignments for such persons when appropriate in the interest of their further development. The Board also will use its inventory of executive abilities to recommend inter-Office transfers of persons to fill key Agency positions.

3. In addition [Office] Career Service Boards are encouraged to maintain inventories of any skills and abilities which they find helpful for use in their internal personnel planning.

Tab D

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SECURITY INFORMATION

## PERSONNEL EVALUATION REPORT

(See Instructions on Reverse Side)

The Personnel Evaluation Report is an important part of the Career Service Program. It seeks to assure for every person a carefully planned career, with advancement based on demonstrated ability. For the individual, it means an opportunity to voice his interests and to discuss his job and his progress with his supervisor. To the supervisor, it gives assistance in carrying out a major responsibility, the development of the people he supervises. For the Agency as a whole, it means successful teamwork based on mutual understanding and respect.

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20. COMMENTS (Continued):

INSTRUCTIONS

1. Instruction to the Administrative or Personnel Officer

Consult current Administrative Instructions regarding the initiation and transmittal of this report.

2. Instruction to the person evaluated

Since this evaluation will become an important part of your record, you will want to give to it as much care and attention as you would like to have it receive from your Supervisor and the Reviewing Official. With respect to Items 8 and 9, you should include courses of instruction or assignments, either within or outside of the Agency, which you consider pertinent to your career development.

3. Instruction to the Supervisor and the Reviewing Official

a. As the supervisor who assigns, directs and reviews the work of others, you bear primary responsibility for planning and fostering the development of each person under your supervision, commensurate with his capacity, aptitude, knowledge and skills. As an alert supervisor, you judge the people working with you on a job-by-job and day-by-day basis and use this information in carrying out your supervisory responsibilities. Although evaluation is a continuous process, it is necessary periodically to record your observations and recommendations for appropriate action. In preparing the report you should consider the individual's capabilities for further development in his present assignment and his potentialities for more effective utilization in other positions, including work of a more responsible and difficult nature.

b. The following traits are generally regarded as having some bearing on a person's performance and development. Although you are not asked for specific ratings, do not hesitate to refer to these or similar traits in your comments, which should be terse and precise.

COOPERATION  
DEPENDABILITY  
ACCURACY  
SECURITY CONSCIOUSNESS  
INITIATIVE

RESOURCEFULNESS  
STABILITY UNDER PRESSURE  
ABILITY TO OBTAIN RESULTS  
JUDGMENT  
LEADERSHIP

c. In fairness to the individual and in the interest of the Agency, the importance of carefully prepared and accurate Personnel Evaluation Reports can not be overstressed. The following basic principles of evaluation should be kept in mind:

(1) Base your judgment on

- (a) What you have observed the individual do or fail to do.
- (b) Typical performance as well as critical incidents.
- (c) Examples relevant to the duties under consideration.

(2) Different standards prevail in different assignments. Every effort should be made to arrive at a just estimate of the qualities of the individual as demonstrated during the report period. Avoid exaggerations. They detract from the value of the report and are unfair to others.

(3) BIASED OPINIONS BASED ON PERSONAL LIKES AND DISLIKES MUST BE SCRUPULOUSLY AVOIDED. IT SHOULD BE BORNE IN MIND THAT THE PREPARATION OF EVALUATION REPORTS IS AN IMPORTANT RESPONSIBILITY OF ALL SUPERVISORS AND THEIR CAREFUL PREPARATION IS AN INDICATION OF THE SUPERVISOR'S OWN ABILITY AND QUALIFICATION FOR THE POSITION HE HOLDS.

4. A FRANK DISCUSSION BETWEEN SUPERVISOR AND INDIVIDUAL CONCERNING THIS REPORT IS NECESSARY IN ORDER TO ASSIST IN THE DEVELOPMENT AND BEST USE OF EVERY INDIVIDUAL'S CAPABILITIES.

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## PERSONNEL EVALUATION REPORT

Items 1 through 6 will be completed by Administrative or Personnel Officer

1. NAME (Last) (First) (Middle)		2. GRADE	3. POSITION TITLE	
4. OFFICE	STAFF OR DIVISION	BRANCH	<input type="checkbox"/> DEPT'L. <input type="checkbox"/> FIELD	IF FIELD, SPECIFY STATION
5. PERIOD COVERED BY REPORT From To		6. TYPE OF REPORT <input type="checkbox"/> Initial <input type="checkbox"/> Annual <input type="checkbox"/> Special <input type="checkbox"/> Reassignment <input type="checkbox"/> Reassignment of Supervisor		

Items 7 through 10 will be completed by the person evaluated

7. LIST YOUR MAJOR DUTIES IN APPROXIMATE ORDER OF IMPORTANCE, WITH A BRIEF DESCRIPTION OF EACH. OMIT MINOR DUTIES.

8. LIST COURSES OF INSTRUCTION COMPLETED DURING REPORT PERIOD.

Name of Course	Location	Length of Course	Date Completed
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9. IN WHAT TYPE OF WORK ARE YOU PRIMARILY INTERESTED?

IF DIFFERENT FROM YOUR PRESENT JOB, EXPLAIN YOUR QUALIFICATIONS (APTITUDE, KNOWLEDGE, SKILLS).

10.

DATE

SIGNATURE

Items 11 through 13 will be completed by Supervisor

11. BRIEFLY DESCRIBE THIS PERSON'S PERFORMANCE ON THE MAJOR DUTIES LISTED UNDER ITEM 7 ABOVE.

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12. IN WHAT RESPECT IS THIS PERSON'S PERFORMANCE ON PRESENT JOB MOST NOTICEABLY GOOD OR OUTSTANDING?

13. ON WHAT ASPECT OF PERFORMANCE SHOULD THIS PERSON CONCENTRATE EFFORT FOR SELF IMPROVEMENT?

14. COMMENT ON THIS PERSON'S ABILITY TO HANDLE GREATER RESPONSIBILITIES NOW OR IN THE FUTURE.

15. ARE THERE OTHER DUTIES WHICH BETTER SUIT THIS PERSON'S QUALIFICATIONS? (Recommend appropriate reassignment, if possible.)

16. WHAT TRAINING OR ROTATION DO YOU RECOMMEND FOR THIS PERSON?

17. IF PERFORMANCE DURING REPORT PERIOD HAS BEEN UNSATISFACTORY, THERE IS ATTACHED COPY OF MEMORANDUM NOTIFYING THIS PERSON OF UNSATISFACTORY PERFORMANCE.

18. THIS PERSONNEL EVALUATION REPORT HAS BEEN DISCUSSED WITH THE PERSON EVALUATED. ADDITIONAL COMMENTS INCLUDING COMMENT ON ITEMS 7, 8 AND 9, ARE SHOWN BELOW UNDER ITEM 20.

DATE

SIGNATURE OF SUPERVISOR

19. I HAVE REVIEWED THE ABOVE REPORT. (Comments, if any, are shown in item 20.)

DATE

SIGNATURE OF REVIEWING OFFICIAL

20. COMMENTS: If necessary, may be continued on reverse side of cover sheet.

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